



Scheduling Manager App

User Manual

VA



U.S. Department of Veterans Affairs

Veterans Health Administration
Office of Connected Care

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User Manual

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Overview

The Scheduling Manager mobile application (app) allows U.S. Department of Veterans Affairs (VA) schedulers to receive and book appointment requests sent by patients through the Veteran Appointment Request (VAR) App, and securely send messages to patients who are using the VAR App.

This app is available for iOS, Android and Windows operating systems, and is supported by these Internet browsers:

1. Internet Explorer 10 and higher
2. Safari 7 and higher
3. Firefox 24 and higher
4. Google Chrome 30 and higher

This user manual provides an in-depth, step-by-step guide for using the Scheduling Manager App.

The Basics

Prerequisites

To use the Scheduling Manager App, you must be a VA employee with access to Veterans Health Information Systems and Technology Architecture (VistA) scheduling.

Logging in

Access the Scheduling Manager App > Tap **Login** > Enter your VistA Username > Enter your VistA Password > Begin typing in a VA Hospital Location > A list of matching facilities will appear in a drop-down list > Tap your VA facility > Tap **Sign In** > You will see a disclaimer that informs you that the app does not display any patient warnings that are usually displayed when you access patient data through VistA or the Computerized Patient Record System (CPRS) > Tap **Accept** to continue to the app or **Cancel** to exit.

Getting to know the home screen

When you log in to the Scheduling Manager App, you will see two main navigation sections of the app:

- Veteran Requests – view patients' appointment requests and send secure messages to patients who are using the VAR App
- Booking – select a clinic, date and time, and book appointment requests

NOTE: Before you can book an appointment, you must first select a specific patient appointment request in the Veteran Requests tab.

The screenshot displays the Scheduling Manager App interface. The top navigation bar is blue with a hamburger menu icon on the left. Below the bar, the 'Veteran Requests' tab is selected, showing a list of patient requests. The list has columns for Alerts, Patient Name, Facility, Type, Status, and Last Activity. The patient 'MobileAppsVeteran, One' is selected, and a message exchange is shown on the right. The message exchange includes a 'Send' button, a 'Message to veteran' field, and a 'From Staff' field. The current status of the request is 'Cancelled'.

Alerts	Patient Name	Facility	Type	Status	Last Activity
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Cancelled	12/24/2014 13:59:57
	MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	01/26/2015 10:43:37
	MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	02/05/2015 14:57:21
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Cancelled	02/05/2015 15:05:52
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Not Booked	02/05/2015 15:09:42
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/05/2015 15:13:11
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/12/2015 09:51:49
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/12/2015 14:25:01

MobileAppsVeteran, One
 Last One First MobileAppsVeteran
 DOB Apr 07, 1900 Age 79 Gender MALE
 SSN 666-66-1234

This exchange is limited to four (4) messages. If you need additional information, please call the Clinic.

Message to veteran
 Appointment has been cancelled

Send

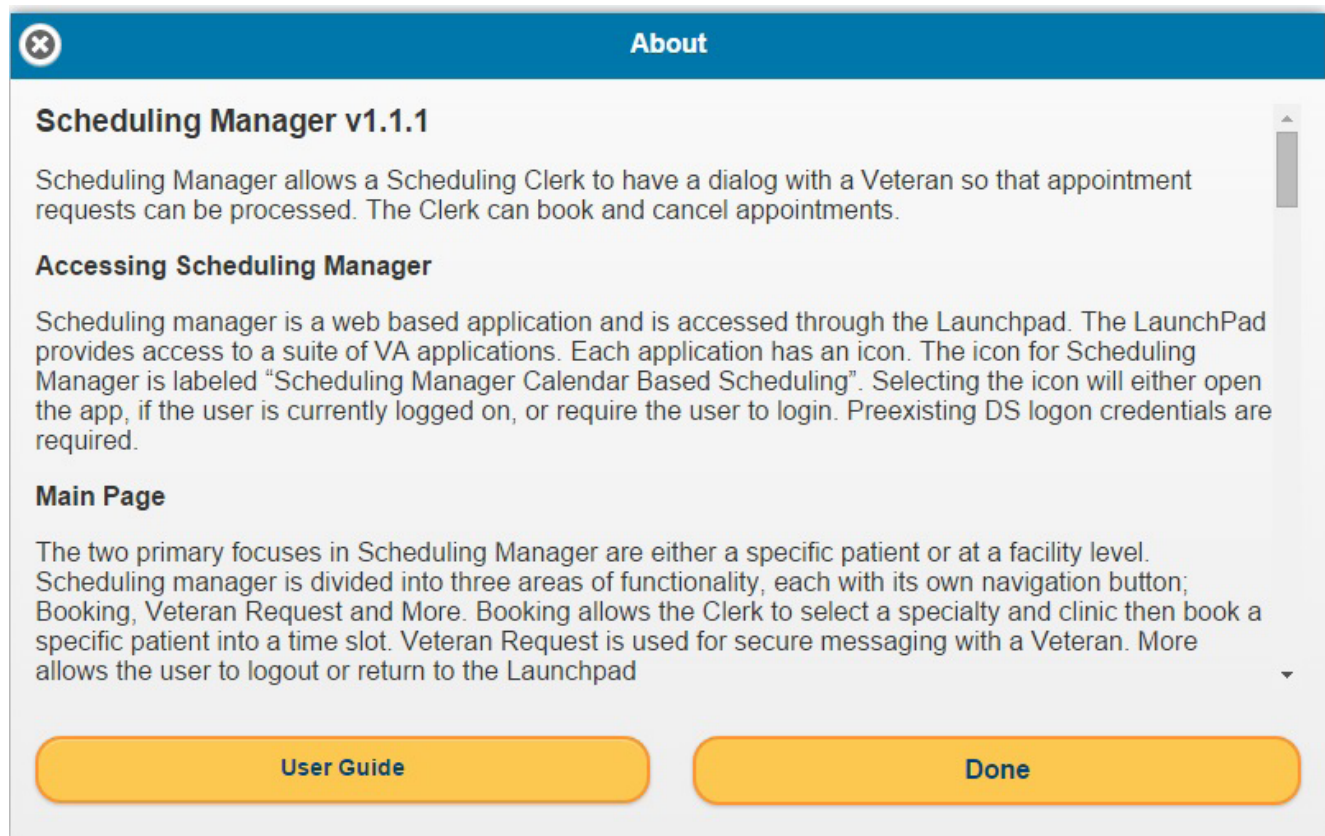
From Veteran: 03/05/2015 09:19
 Testing testing

From Staff: 03/05/2015 09:12
 Yeah - trying

Current Status: Cancelled

Learning about the app

Tap the three-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **About** > A pop-up About window will appear that provides an overview of the app and explanations about its features > Either tap the **X** in the upper left corner, or tap the **Done** button to close the About window. You can also tap **User Guide**, which will open a PDF of instructions in a separate window.

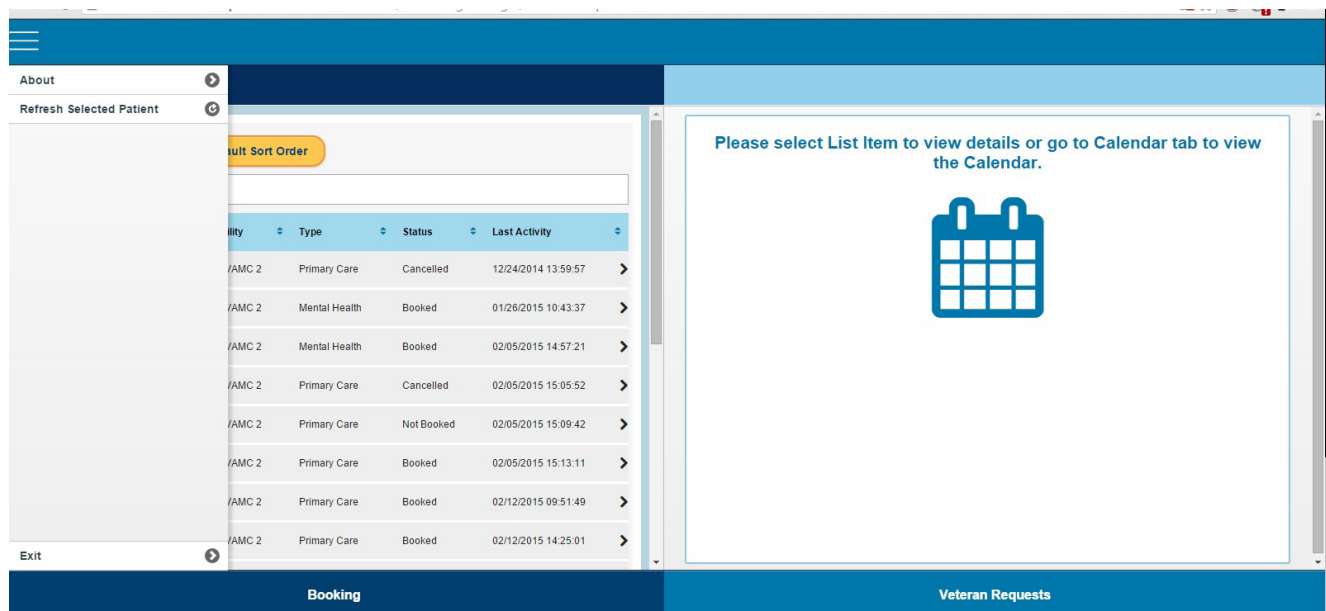


Accessing the VA Launchpad

Tap the three-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Exit** > Tap **Launchpad** from the pop-up window that appears.

Logging out

Tap the three-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Exit** > Tap **Logout** from the pop-up window that appears.



Veteran Requests

View a complete list of appointments that VA patients have requested through the VAR App, see the details of the requests and process (or book) an appointment request. The Scheduling Manager App also allows you to receive and send secure messages from and to patients who are using the VAR App.

Veteran Requests

Last One DOB Apr 07, 1900 SSN 666-66-1234

First MobileAppsVeteran Age 79 Gender MALE

Refresh

Restore Default Sort Order

Filter...

Alerts	Patient Name	Facility	Type	Status	Last Activity
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Cancelled	12/24/2014 13:59:57
	MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	01/26/2015 10:43:37
	MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	02/05/2015 14:57:21
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Cancelled	02/05/2015 15:05:52
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Not Booked	02/05/2015 15:09:42
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/05/2015 15:13:11
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/12/2015 09:51:49
	MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/12/2015 14:25:01

MobileAppsVeteran, One

This exchange is limited to four (4) messages. If you need additional information, please call the Clinic.

Message to veteran

Appointment has been cancelled

Send

From Veteran:

Testing testing

From Staff:

Yeah - trying

Current Status Canceled

Viewing a patient's requested appointments

When you first log in to the Scheduling Manager App, your screen will default to the Veteran Requests tab > A list of appointment requests from Veterans using the VAR App will appear that shows you:

- If there is an alert on the request
- Patient's name
- Facility
- Type of appointment
- Appointment status (submitted, booked, not booked or cancelled)
- Date and time when the request was last acted upon

You can sort the appoint request list by tapping any of the column headers. (To return to seeing all appointments, tap **Restore Default Sort Order**. To view any new requests that have come in from the VAR App and see the most up-to-date list of appointment requests, tap the **Refresh** button.) To select a specific appointment, tap on the appointment within the list > The appointment details and any messages to and from the patient about the appointment will appear in the right pane of your screen.

Understanding Appointment Status

Appointment requests will be listed with one of four statuses:

- Booked – an appointment that has been successfully booked and confirmed
- Not Booked – an appointment that could not be booked because the scheduler was unable to meet the Veteran's request
- Cancelled – an appointment that has been cancelled by either the Veteran or the clinic
- Submitted – an appointment that the Veteran has requested, but that has not been processed by VA

NOTE: While you can send messages related to any of the above appointments, you can only access a patient's information through the Booking tab if they have an appointment with the status of "Submitted."

Viewing message history

Tap the appointment that is the topic of your conversation > The appointment details will appear in the right pane of your screen; if there have been any previous messages to and from the patient about the appointment, the messages will appear in comment bubbles alternating from Veteran and from Staff and will show the date and time of the message.

Messaging a patient

To message a patient about an appointment, you must first tap the appointment that is the topic of your conversation > The appointment details and any past messages will appear in the right pane of your screen > Type your comments (up to 100 characters) in the Message to Veteran box > Tap **Send**. **NOTE:** A conversation is limited to four total exchanges, and messages should not be used to inform patients that appointments have been cancelled.

Booking or processing a patient's submitted appointment

If a patient has submitted an appointment request through VAR but the appointment has not yet been booked, it will be listed as Submitted in the Veteran Requests tab and you can process the request using the Scheduling Manager App. Tap the **Veteran Requests** tab at the bottom of the screen > Tap the specific Submitted appointment request you would like to book so that its details appear in the right pane of your screen > Tap the **Process Request** button > You will go to the Booking tab. (See next section for more information).

Veteran Requests

Last One First MobileAppsVeteran
DOB Apr 07, 1900 Age 79 Gender MALE
SSN 666-66-1234

Patient Name	Location	Service	Status	Timestamp	Action
MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/12/2015 14:25:01	>
MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/19/2015 11:00:39	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	02/20/2015 16:07:59	>
MobileAppsVeteran, One	LV VAMC 2	Primary Care	Booked	02/24/2015 13:26:37	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	03/05/2015 09:10:10	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Cancelled	03/05/2015 09:13:25	>
MobileAppsVeteran, One	LV VAMC 2	Primary Care	Submitted	03/12/2015 12:02:32	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Submitted	03/12/2015 12:34:01	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Booked	03/12/2015 12:51:43	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Submitted	03/12/2015 13:20:15	>
MobileAppsVeteran, One	LV VAMC 2	Mental Health	Submitted	03/13/2015 10:39:36	>

First Prev 1 Next Last Showing 1 - 18 of 18

MobileAppsVeteran, One

When in process, this request will be locked for other users. **Process Request**

This exchange is limited to four (4) messages. If you need additional information, please call the Clinic.

Message to veteran

Enter Text Here... (maximum of 100 characters). Messages are NOT intended to be used for Cancelling an appointment. Messages are NOT intended to be used for "clinical"

Send

From Veteran: 03/12/2015 13:20

From Staff:

Test

03/12/2015 13:14

Trying...

Booking **Veteran Requests**

Booking

Book an appointment; and view or cancel a patient's future appointments

The screenshot displays the Scheduling Manager App interface. At the top, a header bar shows the user's name 'MobileAppsVeteran, One', a date '04/07/1900 (79) M', and a phone number '666-66-1234'. Below this is a navigation bar with two tabs: 'Calendar' and 'Patient'. The 'Calendar' tab is currently selected. The main content area is divided into two sections. The left section contains a 'Clinic' dropdown menu with 'PRIMARY CARE' selected, a 'Desired Date of Appointment' field with '03/17/2015' and a calendar icon, and a yellow 'VIEW AVAILABILITY' button. Below this is a 'VETERAN REQUEST DETAILS' section with a table showing 'Type of Care' as 'Mental Health', 'Provider' as 'The provider I want to see is not listed', and 'Request Date/Time' as '03/17/2015 AM' with 'No Date Selected' below it. At the bottom of this section are two yellow buttons: 'Cancel Request' and 'Unavailable'. The right section is a large white box with a blue header that says 'Please select a Service/Specialty and Clinic to view availability.' At the bottom of the app, there is a dark blue bar with two tabs: 'Booking' and 'Veteran Requests'.

Understanding the Booking tab

You can tap on the Booking tab at any time, but before you can book an appointment, you must first select a specific Submitted appointment from the Veteran Requests tab. (**NOTE:** You can only select a patient by selecting one of their submitted appointment requests in the Veteran Requests tab. If a patient does not have a current request with the status of "Submitted," you will not be able to view their appointment information in the Booking tab.) At the top of the Booking screen, there are two tabs:

- Calendar – find a facility, date and appointment time to book a patient's request
- Patient – view all of a patient's upcoming appointments

Viewing a patient's contact information

After you have selected a Submitted appointment request in the Veteran Requests tab, you will be taken to the Booking tab > The patient whose information you are viewing will be listed in the upper left corner of your screen including name, birthdate, sex and social security number > Tap the folder icon next to the patient's details for more information > A pop-up Patient Contact Details box will appear > If provided, you will see his or her email address, home and/or work phone numbers and address > Tap **Done** to close the window. You can tap the **X** next to the Patient Details at any time to close out of that patient's record and return to the Veteran Requests screen.

The screenshot displays the Scheduling Manager App interface. At the top, a status bar shows 'MobileAppsVeteran, One' with a folder icon and a close button. Below this, the 'Veteran Requests' tab is active, showing a list of appointment requests. A pop-up window titled 'Patient Contact Details' is overlaid on the screen, displaying the following information:

Email Address	
Home Phone Number	(555)-555-5555
Work Phone Number	(555)-555-5555
Address	Any Street Any Town, WEST VIRGINIA 99998

At the bottom of the pop-up is a yellow 'Done' button. The background shows the 'Booking' tab with a list of appointment requests. The bottom navigation bar has 'Booking' and 'Veteran Requests' tabs, with 'Veteran Requests' currently selected.

Booking appointments

After you have selected a Submitted appointment request in the Veteran Requests tab, you will be taken to the Booking tab > You will see two tabs at the top of the left pane of your screen: Calendar and Patient > Your screen will default to the Calendar view > Begin typing a type of clinic into the Clinic search bar > A drop-down list of available clinics will appear > Tap a type of clinic (**NOTE:** Because Veterans can only request primary care and mental health appointments through the VAR App, be sure to select an appropriate clinic.)> Tap the calendar icon next to the Desired Date of Appointment > A pop-up calendar window will appear > Scroll to choose your desired month, date and year > Tap **Set** to save your desired date > Tap **View Availability** > A calendar will appear in the right pane of your screen. The calendar's icons will help you identify appointment availability:

- Yellow highlighted days – dates with available appointments
- White days – dates with no appointments available
- **Month, week** or **day** tabs – Tap a tab to change how you are viewing the calendar.


If you are viewing the calendar as monthly or weekly, tap on a date you would like to book. The day view of the calendar has a few icons to help you identify appointment availability:

- Numbers – quantity of available appointments within the time
- Letters – quantity of overbooked appointments within the hour (A = one appointment overbooked, B = two, C = three, etc.)
- Special characters – time slot is not normally available for appointments, but has been booked (* = one appointment overbooked, \$ = two, ! = three, @ = four)

Tap a time frame for the appointment > A Book Appointment pop-up window will appear > You will see the patient and appointment details, and information about the request the appointment will fulfill > Indicate whether you are booking a time the patient requested, or whether you have communicated with the patient to choose a different time > Then, indicate the:

- Appointment Type – Tap the **Select Type** bar > A pop-up Select Type box will appear > Tap the type of appointment > The selection will appear next to the Appointment Type heading.
- Purpose – Tap the **Select Purpose** bar > A pop-up Select Purpose box will appear > Tap the reason for the appointment > The selection will appear next to the Purpose heading.
- Notes – Notes are optional. If you would like to add comments, type them into the box. You can enter a maximum of 160 characters.

Tap **Book Appointment** (or to exit without booking, tap **Cancel** or the **X** in the upper left corner) > You will go to a confirmation screen that says your appointment successfully booked > Tap **Close** or the **X** in the upper left corner to return to the Booking tab or **Return to Veteran Requests** to return to the Veteran Requests tab.



 **Book Appointment**

Patient Details	Appointment Details
MobileAppsVeteran, One	PRIMARY CARE
04/07/1900 (79) - MALE	03/18/2015
SSN 666-66-1234	09:00 - 10:00 - 60 mins

Fulfills the Following Veteran Request:

Type of Care	Mental Health
Provider	The provider I want to see is not listed
Request Date/Time	<div><div><input checked="" type="radio"/> 03/18/2015 AM</div><div><input type="radio"/> Booked from alternate after contacting patient</div><div><input type="radio"/> Booked from alternate</div></div>

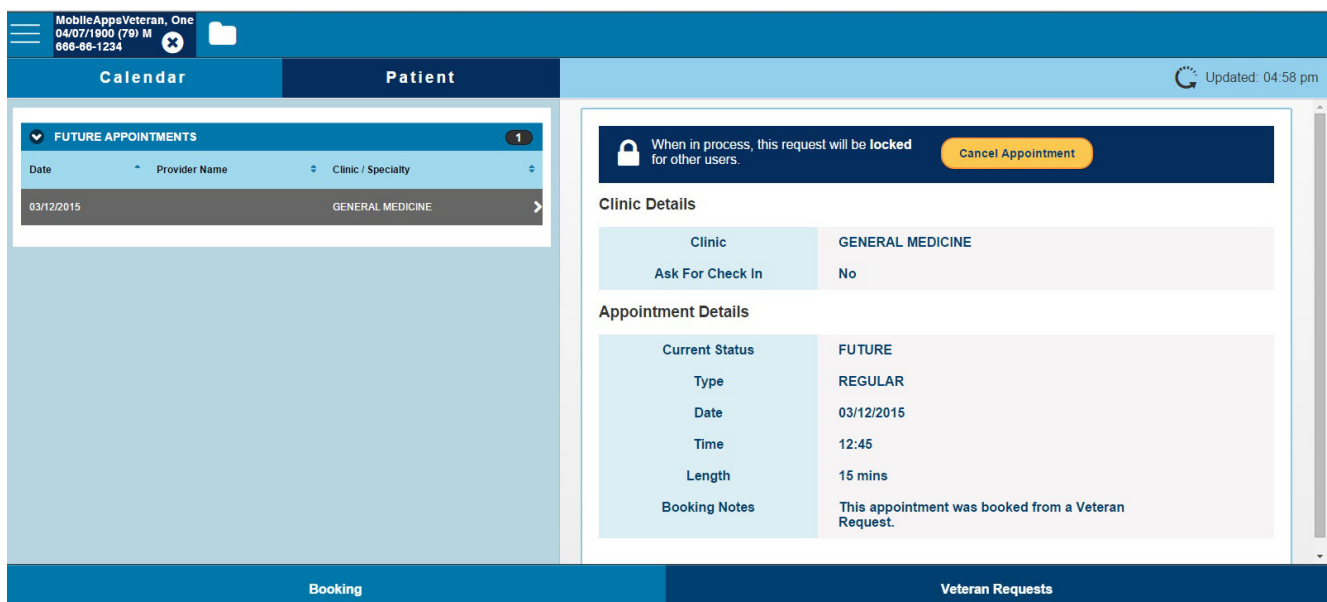
Please Complete the Following:

Appointment Type	<div>Select Type</div>
Purpose	<div>Select Purpose</div>
Characters Remaining: 109	
Notes (Optional)	<div>This appointment was booked from a Veteran Request.</div>

Viewing a patient's future appointments

Tap the **Patient** tab at the top of the Booking tab to view information about the patient whose appointment request you have selected > You will see a Future Appointments tab on the left pane of your screen with a drop-down list appear that shows the date, provider name and clinic/specialty of the patient's future appointments > Tap the specific future appointment you would like to view > The clinic and appointment details will appear in the right pane of your screen. You can cancel the appointment by tapping the **Cancel Appointment** button. (See separate instructions for cancelling an appointment in the 'Cancelling a patient's appointment' section below.)

NOTE: You can only see a patient's appointment information when you have selected one of the patient's submitted appointment requests in the Veteran Requests tab. If a patient does not have a current request with the status of "Submitted," you will not be able to view or cancel future appointments.




Cancelling a patient's appointment

Tap the **Patient** tab at the top of the Booking tab to view information about the patient whose appointment request you have selected > You will see a list of the patient's future appointments > Tap the appointment you would like to cancel so that the appointment's details will appear in the right pane of your screen > On the appointment details, tap the **Cancel Appointment** button > A pop-up Cancel Appointment box will appear > You will see details for the patient and the appointment > Indicate the:

- Status – Tap the **Select Status** bar > A pop-up Select Status box will appear > Tap the reason for the appointment cancellation > The selection will appear next to the Status heading.
- Reason – Tap the **Select Reason** bar > A pop-up Select Reason box will appear > Tap the reason for the appointment cancellation > The selection will appear next to the Reason heading.
- Notes – Notes are optional. If you would like to add comments, type them into the box. You can enter a maximum of 200 characters.

Tap **Cancel Appointment** to confirm the cancellation. To close the window without cancelling, tap the **Do Not Cancel Appointment** button or the **X** in the upper left corner.

**Cancel Appointment**

Patient Details	Appointment Details
MobileAppsVeteran, One	PRIMARY CARE
04/07/1900 (79) - MALE	03/18/2015
SSN 666-66-1234	09:00 - 10:00 - 60 mins

Please Complete the Following:

Status

Cancelled by Patient

Reason

WEATHER

Characters Remaining: 180

Notes (Optional)

There is a blizzard!

Do Not Cancel Appointment

Cancel Appointment

Help and Additional Information

Additional Training Materials for the Scheduling Manager App

In addition to the user guide built into the app, more resources, such as a Quick Start Guide, Slideshow and FAQs, are available at mobile.va.gov/appstore, and search for the app to access the resources.

Help Desk Information

If you need help with the Scheduling Manager App, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial **711**.

Emergencies

You should never use this app in an emergency. If you encounter an emergency, call your local medical center or dial 911. If you feel your information may have been compromised, contact your local VA facility to obtain the contact information for your Privacy Officer. To locate your local VA facility, visit VA's Facility Locator: va.gov/directory/guide/home.asp?isflash=1.

Appendices

Appendix #1: Project References

This app was developed according to an approved concept paper. The app was tested in a demo environment to ensure optimal functionality.

Appendix #2: Glossary

App – an application, or software program, that can be accessed through a website or mobile device and is designed to fulfill a particular purpose

VA – Department of Veterans Affairs

VA Mobile Health – an initiative that aims to improve Veterans' health by providing technologies to expand care beyond the traditional office visit and that includes the creation of secure mobile apps to leverage the popularity of wireless technologies to support Veterans, Caregivers and VA care teams [More at: mobile.va.gov]